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ABSTRACT

This booklet contains training recommendations for professional, administrative, and commercial trainees of the carpet industry in Great Britain. Focus is upon persons to be trained; responsibility for training; assessment of training needs; recruitment and selection; descriptions of types of programs; instruction and supervision; control of training; modern languages; and evaluation of training. Appendixes give information on the recommended pattern of training, overall training program, detailed training program (basic training), specialized training program, and training record. (ni)

CARPET INDUSTRY TRAINING BOARD

Training Recommendations for
PROFESSIONAL, ADMINISTRATIVE AND COMMERCIAL TRAINEES

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
OFFICE OF EDUCATION

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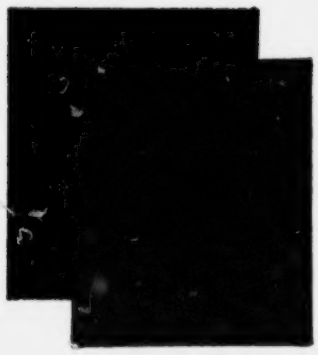

Training Recommendations for

PROFESSIONAL, ADMINISTRATIVE AND COMMERCIAL TRAINEES

CARPET INDUSTRY TRAINING BOARD
WILMSLOW, CHESHIRE *September 1969*

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1. Introduction

These recommendations are for the training of young men and women who are expected to occupy posts of responsibility in accounting, secretarial, commercial and general administrative functions of carpet manufacturing companies.

The training of computer personnel has been excluded from these recommendations because the Board will be publishing separate recommendations in due course. Discussions are taking place on the training needs of computer personnel and the provision of facilities for industry as a whole, and the Board wishes to consider the results of these deliberations in formulating its own recommendations.

Trainees covered by these recommendations should learn to apply the skills needed in their professions efficiently, confidently and consistently in a wide variety of circumstances and without constant and close supervision. They should also acquire the general and professional knowledge complementary to the practical skills of their profession and learn to apply this knowledge. Trainees should develop such personal qualities as are necessary to the discharge of those responsibilities which they will be expected to carry in due course.

Trainees will need to reach professional standards, and their training should equip them with a range of skills and knowledge both broader and deeper than those needed for any particular job at any one time.

The Board's general approach, therefore, is based on:

i. clearly defined responsibility for training and the supervision of training.

ii. sound methods of recruitment and selection.

iii. planned programmes of broadly based common basic training, followed by comprehensive training and associated practical experience in the field in which the trainee is to specialise.

iv. complementary further education leading to qualifications at professional level and eligibility for membership of an appropriate professional institute.

v. regular assessment and review of achievement and progress throughout the training period.

2. Persons to be Trained

These recommendations cover those young men and women of above average ability from whom a substantial number of managers and specialist officers will be drawn. Whether or not they are actually called trainees, they would be expected, at the conclusion of their period of professional training to be occupying, or intended for, supervisory or junior managerial or specialist posts in such work as:

budgetary control
company secretarial work
cost accountancy
data processing
export sales administration
financial accounting
general administration
marketing
organisation and methods
personnel
production planning and control
purchasing
sales administration
sales management
sales planning and forecasting
transport and distribution
warehouse and stock control

Persons to be trained should be capable of eventually becoming members of a professional institute. They would be expected to possess already academic qualifications giving exemption from the preliminary examinations of professional bodies. This means four and for some institutes – five – 'O' level passes, including English and Mathematics, in General Certificate of Education (or 'O' grades in the Scottish Certificate of Education or Grade 1 passes in the Certificate of Secondary Education).

Even for occupations for which no such entry qualifications are required, it is recommended that recruits should be of equivalent calibre if not of equal attainment.

Normally trainees will be recruited at one of three levels:

i. 16/17 years of age, possessing the appropriate 'O' levels, for whom a five-year period of training is envisaged, composed of two years' basic training and three years' specialised training and job experience.

ii. 18/19 years of age, possessing 'A' levels, for whom a four-year period of training is appropriate, composed of eighteen months'

basic training and thirty months' specialised training and job experience.

iii. 21/22 years of age, possessing a degree level qualification, for whom a three-year period of training is recommended, made up of six months' basic training and thirty months' specialised training and job experience.

Particular attention is drawn to the need to modify the length of training periods and especially the examples of training programmes at Appendices A to D in accordance with the trainees pre-entry qualifications, experience and progress during all training stages. This is particularly relevant to graduate trainees, for whom it may be necessary to compress considerably the model programmes so that they cover shorter periods. It should not, however, be assumed that such compression is automatically necessary; the need is most likely to be made apparent by trainees showing capacity for rapid progress during the initial training stages.

Similar modification may be necessary for trainees with 'A' level qualifications.

Though practical experience and further education periods will vary according to the subjects and levels of the qualifications of the entrants, it should be possible and desirable after basic training to employ trainees on responsible jobs in line with their training and development.

Nothing stated in these recommendations is intended to preclude present employees or recruits with lower levels of attainment who show their worth in other ways, from being offered similar training leading eventually to similar opportunities.

3. Responsibility for Training

In all the Board's training recommendations, the need has been stressed for all training to be co-ordinated at the policy level, with a senior executive charged specifically with general responsibility for training.

It has also been stressed that the responsibility of managers and others and the training systems within which their responsibility is to be discharged should be clearly set down in writing.

This should indicate who is accountable for:

i. assessing recruitment and training needs.
ii. drawing up suitable training programmes.
iii. recruitment and selection of trainees.
iv. overall supervision of the training programmes.
v. day-to-day supervision within the training programme.
vi. giving instruction.
vii. maintaining records and assessing trainee's progress.
viii. evaluating the training.

The allocation of these responsibilities will vary with the size and organisation of each company, but they will all need to be covered.

4. Assessing Training Needs

Arrangements for assessing the company's requirements for professional trainees should fit in with the company's system of forecasting its future manpower needs at manager and technologist levels. Because of the length of time it takes to produce a professionally qualified man, the forecast has to be made several years ahead.

The company's manpower needs must be assessed and should take into account:

(a)	changes in size and structure	– growth or contraction of the company. – diversification. – additional factories.
(b)	changes in policy	– increase in export percentage and volume. – change from agents to own outlets. – use of own transport instead of contractors.
(c)	changes in methods and equipment	– organisation and methods. – buying computer time. – new machinery.

Changes within the relevant departments should also be studied. Statistics of labour turnover, failure rates of trainees, age distribution of employees and retirement schedules are some of the useful indicators.

In planning their trainee intakes, companies will need to consider contingencies as well as foreseeable changes, and to allow also for wastage through failure, unsuitability and turnover among trainees.

5. Recruitment and Selection

In view of the investment of time and money in these trainees – and the vital effect of their future performance – the Board emphasises again the importance of sound recruitment and selection procedures if training is to be fully effective.

Sources of recruitment need careful consideration. Careers officers, heads and careers masters of local schools and colleges should be made aware of what the company has to offer in training and prospects. Good relationships with those who guide the choice of career of young men and women are of benefit to all.

The recruitment process should begin at the time when the most suitable potential recruits are considering their future employment. These students are often placed well before the end of the academic year.

The objective of any selection procedure is to predict either which of the applicants is likely to be permanently satisfactory or in which of the available jobs an applicant is most likely to succeed. Thus it is necessary to know both what to look for and what the applicant can do.

The first step is to produce a Job Description, which is a statement of the purpose, scope, duties and responsibilities of a particular job and the conditions under which the work is to be performed. In situations where a recruit may go into one of a number of occupations, this information will be needed for each one.

From the information in the Job Description, it is possible to draw up an outline of the kind of person suitable for the appointment. It is helpful to have a system of classifying the various attributes to be looked for and one of the most successful has been the National Institute of Industrial Psychology's Seven Point Plan, in which the information is classified under the headings of:

- physical make-up
- attainments
- general intelligence
- special aptitudes
- interests
- disposition
- circumstances

At this stage the kind of person sought is known, and the problem is to decide which of the attributes each applicant has and to what degree. The main sources of information about the individual are the letter of application and the completed application form, tests where these are appropriate, the interview and references.

The most important part of the selection procedure is the interview. Its purpose is to find out about the applicant and he should be encouraged to do most of the talking. The interview should be more of a conversation than an interrogation, the role of the interviewer being to start it and keep it moving in the right direction. In a good interview the applicant will be talking most of the time about his past experience and future plans, and the interviewer will be looking for omissions, inconsistencies and attitudes. The majority of trainee applicants have little knowledge of the work involved in a job, and the interviewer needs to assess very carefully how far their ambitions are based on realistic ideas of the work, their achievements so far and the way in which they are maturing.

References from schools may be useful. It is not easy to forecast the way in which young men and women of 16/18 will develop, particularly when there is no previous employment history, and the advice of someone who has seen them progress over a few years is well worth consideration. It is better to ask a series of specific questions rather than to ask for a general reference.

In arriving at a decision it is useful to have a system of collating the information. One good way is to write down the seven headings of the Seven Point Plan and to record under each the conclusions reached and the evidence on which the judgment has been made.

6. Programmes of Training

The Board feels that because it is becoming increasingly important for future management personnel to gain an appreciation of functions other than their own, trainees should follow a common basic training before embarking on the specialised training of their chosen profession.

This would also allow the company and the trainee to defer the decision on specialisation until both have a clearer idea of how the requirements of the work match the attributes of the trainee.
Appendix A sets out the broad pattern of training and further education recommended for professional, commercial and administrative trainees. For older entrants this would need to be modified to take account of higher qualifications, the exemption provisions of the professional bodies and the shorter training periods suggested in Section 2 – Persons to be trained.

Within this framework, each programme should make provision for:

(a) induction

(b) common basic training

(c) specialised training and planned experience

(d) further education

and should show:

i. the skills to be acquired and the knowledge to be learned

ii. the sequence in which the various items are to be covered

iii. a time-table or time scale

iv. the arrangements made for training, including methods of instruction

v. responsibility for instruction and supervision of the programme

6.1 Induction

Good induction arrangements enable recruits to settle down quickly and enable management to establish good relationships and attitudes right from the start. All employees need induction, but in addition to the normal content of induction for staff trainees, should acquire a deeper appreciation of the company's organisation and processes.

Part of the induction programme should be given at the start of employment but some parts may be spread over a period of time. In large companies, induction may take the form of a course but in

small companies, or where intakes are small, induction is more likely to be an individual arrangement. In both cases, the items to be covered should be set down and the person, or persons, responsible specified.

Below are some of the matters which are usually included in induction programmes:

Early stages of employment

Personal reception of new recruit, covering domestic details – dealing with National Insurance card. Hats, coats, lockers, location of cloakrooms, lavatories, etc., canteen facilities and system of ordering, etc., introduction to supervisor, colleagues, commissionaires or security men, etc.

Conditions of service including contract of employment and redundancy payments regulations; hours of work, meal and tea breaks; holiday entitlements, absenteeism and sickness, medical certificates; salary and payment system, what it is, how calculated, when and how paid, overtime; job evaluation, merit rating or grading schemes if used.

Personnel policies, including pension schemes, savings schemes, sports, social and welfare facilities; promotion policy, education and training arrangements and facilities and career possibilities; disciplinary and grievance procedures; joint consultation; suggestion schemes; purchase of company products, etc.
Safety, accident prevention and fire drills; legal obligations under Offices, Shops and Railway Premises Act etc.

Spread over a period

Facts about the industry – size, woven, tufted, plastic cord, market, export performance, etc.

Facts about the company – history, organisation, who's who and where the new recruit fits in, company's products, tour of factory, office, design studio and showroom.

Facts about organisation (appreciation of function in broad terms) – market and sales planning, outlets for sales, ordering procedures, design.

– production planning and control, raw materials supply, manufacturing organisation, use of work study, statistics, costing techniques.

	– laboratory, quality control, computer, personnel, wages and accounting, warehousing and distribution.
Facts about processes (broad appreciation brief outline with emphasis on company's processes)	– carpet manufacture – Wilton plain and figured, gripper Axminster, gripper/spool Axminster, spool Axminster, tufted plain and patterned,
	– other processes.
	– raw materials – wool, nylon, jute, cotton, etc.
	– yarn preparation – teazing, blending, carding, spinning, doubling, reeling, dyeing, winding, spool setting, wet and dry beaming.
	– manufacture – creeling, weaving, machine operating, stamping, threading, tuning.
	– finishing – picking, shearing, latexing, sizing, backing, hemming, fringing, planning, cutting, pattern book making, packing.

6.2 Common Basic Training

Within the framework of the overall programme, arrangements should be made for broad basic training. For the 16/17 year old entrant this would last for two years, for the 18/19 year old eighteen months, but for the 21/22 year old it would be reduced to an intensive six month period.

In its Training Recommendations for Clerical and Commercial Occupations the Board recommended basic training for young office workers covering a range of skills and procedures fundamental to the work of a normal office. The younger trainees should acquire both the basic clerical skills and the understanding of procedures mentioned in the recommendation, but in the case of the older trainees (e.g. 18 and over) emphasis should be placed on understanding the office systems.

This should be followed by in-company training, covering the works, general office and sales office administration. Programmes should provide training in the main office procedures and services, and give experience in at least three of the following departments or sections:

general office
wages
purchasing
cost accounts
financial accounts
work study
production
sales and marketing
stock control
production planning
data processing
personnel

Approximately half the basic training time should be allocated to manufacturing and production service departments, and the remainder to accounting, administrative, sales and other departments.

Programmes may be set down in broad outline covering the whole period of training, supported by more detailed programmes planned at appropriate times. An example of an overall programme and of a detailed programme, drawn up on the lines suggested, appear at Appendices B and C. These are illustrations based on the needs of a 16 year old entrant only and are not intended as specific recommendations.

Programmes will vary according to the age and qualifications of the trainee. The content may range from almost an extended induction comprising rapid instruction in the organisation and systems, to full programmes providing for longer periods in departments.

The emphasis should be on understanding the organisation and systems rather than on detailed procedures, but trainees should nonetheless be given useful practical work to do and not merely be observers. For example, a trainee may learn an operative's job in an appropriate department if time permits.

In addition to normal departmental work, trainees should be given specific projects to do. These will depend upon the capabilities of each trainee and the stage of training and may vary from a straightforward task such as recording a particular system to investigating problems and making recommendations.

6.3 Specialised Training/Job Experience

Towards the end of basic training, a decision will have to be made about the trainee's future profession, and a suitable training programme should be drawn up. In planning the programme, companies will need to take into consideration the practical training and experience requirements of the appropriate professional body, as well as the range of work within the company. It may be that some companies cannot offer an adequate range of experience, and consideration should be given to other ways of doing so, such as group arrangements with other companies.

The programme should specify the experience to be gained and the departments within which the trainee will work. An example of a programme of specialised training for a cost and works accountant appears as Appendix D supported by a detailed programme as Appendix E. These are similar in principle to those for basic training and are examples only and should not be regarded as specific recommendations.

Within this framework, the departmental supervisor will need to arrange job rotation and so allocate work that the full range of experience is given. At this stage the trainee would gain experience in a series of responsible jobs, supplemented by individual guidance and coaching. He would perform increasingly difficult tasks, and be given greater responsibility with more complex projects and assignments as the programme proceeded.

6.4 Further Education

Programmes should lay down for each trainee the further education leading to professional or other business qualifications and day release should be given for this purpose. Companies are however advised to give serious consideration to the use of block release courses as an alternative.

The recommended patterns for further education are set out in Appendix A, although this may need to be modified if local facilities are limited.

The Board recommends the use of the two-year part-time course leading to the Ordinary National Certificate in Business Studies for all trainees (other than graduates). Credit level passes in the O.N.C. give subject for subject exemption in the Intermediate examinations of most of the appropriate professional bodies. Companies are advised to check with the local colleges that the optional subjects available match up with those needed for exemption.

On completion of O.N.C. alternative paths are available according to the future aims of the trainee. Those specialising in personnel, transport, sales and marketing, or purchasing may proceed to the Higher National Certificate in Business Studies, or to examinations for membership of the appropriate professional body. Those specialising in accountancy or company secretarial work are advised to take courses leading directly to the examinations of the professional bodies.

In certain cases trainees may be better advised to take a course leading directly to the examinations of a professional body right at the start.

Examples are:

(a) graduates and older trainees.

(b) trainees who are definitely committed to a chosen profession.

(c) when exemption afforded to holders of the O.N.C. is inadequate, owing to limited choice of optional subjects at the college.

In all cases companies are advised to consult local colleges about available courses, and the optional subjects available on the courses, and the regulations of the professional bodies.

In principle, the use of correspondence courses is not recommended. However, it is recognised that sometimes there are no suitable courses available at a college, particularly at the more advanced levels. Therefore, the Board recommends that correspondence courses are used to prepare for qualifications only when there is no satisfactory alternative method of preparing for the examination and when companies are able to make arrangements for adequate supervision of the student's progress.

7. Instruction and Supervision

Each trainee will receive instruction from a number of persons during his period of training. It is desirable that, as far as possible, these should be persons who have not only a thorough knowledge of the practical work to be done but also an understanding of the systems within which the work is done and the principles behind them.

It is recommended that a member of management is appointed as a general adviser to each category of trainee. He would be responsible for counselling the trainee and explaining the 'professional' significance of each training stage. It is not suggested that one man should be adviser to all trainees but that after the basic training stage, each trainee should have access to one qualified man in his own chosen field.

An interest in young people and skill in teaching are also important attributes. The Board recommended the use of courses in instructional methods in its recommendations for training clerical workers and wishes to re-affirm the value it attaches to these.

8. Control and Training

The Board recommends the establishment of adequate procedures for controlling the training and assessing its effectiveness. These should provide a control that the programmes are being carried out as planned, and a means of informing the trainee and the person in overall charge of his training progress and should include:

(a) training records.

(b) work-books.

(c) appraisal of progress and assessment of individual training needs.

8.1 Training Records

Records of training and progress should be kept for each trainee. These may be kept in an envelope or folder, containing copies of the overall training programme, detailed programmes, specialised training programmes, performance records such as the example shown in Appendix F, records of project work, college reports and periodic appraisals.

8.2 Work-Book

Each trainee should keep a work-book in which to record the significant features of the work he has been doing. This will help him:

i. to record systems of work for future reference.

ii. to think about his work and to develop a constructive approach to it.

iii. to provide management responsible for his training with information about his progress.

iv. to develop his ability to express himself clearly, logically and concisely.

8.3 Appraisal of Progress and Assessment of Individual Training Needs

It is important that the progress of each trainee should be kept under review. This should be a continuous process including regular discussions with the trainee of the content of the work-book, performance on projects, assignments and sections of the training programme, written tests or other methods of assessing knowledge required. Periodically a comprehensive appraisal of each trainee's

strengths and weaknesses should be made, so that adjustments may be made to the original programme. This will involve the person in overall charge of the training in discussing progress and performance with the persons giving the instructions, college tutors, and the trainee.

9. Modern Languages

The Board is aware of the need for more general knowledge of modern languages, particularly for trainees who may move into export sales or have contact with overseas customers.

There are a number of ways in which this can be arranged:

i. by selecting a language as an optional subject in the O.N.C. and H.N.C. (in this case, the 'cost' of not doing a different subject will need to be assessed).

ii. by selecting a language as an optional extra subject to professional studies (in this case, the trainee's ability to take on the extra load will need to be assessed).

iii. language courses at the post-professional stage, either on an evening or day release basis or as short 'language laboratory' block courses.

It is recommended that courses are selected which concentrate on contemporary idiomatic language, spoken and written, based on everyday business vocabulary and usage, using language laboratories to develop fluency. Courses leading to a minimum level of proficiency of the intermediate stage of the Association of British Chambers of Commerce language proficiency tests are recommended. For trainees specialising in export sales, the advanced stage should be the target.

10. Evaluation of Training

The Board recommends companies to attempt to evaluate their training. While it is not easy to do this in a precise way when the benefits are likely to show only after a lengthy period of time has passed, as with any other investment it is important that consideration should be given to the cost/benefit relationship. It is for this reason that the evaluation of training is mentioned in Section 3 among the responsibilities for training.

Consideration should be given to:

the programme	– are the allotted periods of time right?
	– is the syllabus covered within the allotted time?
	– is the sequence of the programme logical?
	– is the pace of the programme slow, too quick or just right?
	– is the programme practicable to administer?
the instruction	– is the laid down syllabus covered?
	– does the trainee's performance indicate good instruction?
	– do the work books and project reports show evidence of sound teaching?
	– are the records well kept and the assessments well judged?
the control system	– are plans and arrangements made on time?
	– do movements and transfers take place on time?
	– are records complete and ready on time?
selection and recruitment	– are turnover and wastage among trainees high?
	– are their performances during training satisfactory?
	– are they successful in their studies?
	– do they apply themselves to their work?
	– do they develop the expected personal qualities?

the trainee	– does he acquire the knowledge of the work satisfactorily?
	– is his subsequent performance satisfactory?
	– are his project reports well-prepared and done on time?
	– do they show evidence of sound reasoning, understanding of the problems, initiative and originality of thought?
	– is his academic record one of success?
	– are the reports on his general conduct and interest good?
the total system	– how frequently do you have to recruit qualified staff from outside?
	– is the performance of those who have been trained good?
	– are the promotion and career patterns, both within and outside the company, of those who have been trained, satisfactory.
costs	– have you a cost centre for training so that costs may be identified and allocated?
	– are indirect as well as direct charges taken into account?
	– is the reduction in loss caused by inadequate training measured?
	– is the administrative cost of isolating costs and credits prohibitive?

These are some of the questions which should be posed. The answers in some cases will be measurable; though in many they will be based on assessment. The Board would like to encourage the evaluation of training in objective terms wherever possible.

11. Conclusion

These recommendations concern the comprehensive training of professional, commercial and administrative trainees. In applying them within companies, it is not necessary to think in terms of departments but in terms of activities or functions irrespective of whether these constitute separate departments. They can be applied in any company whatever its size, provided that there is an adequate range of work to give the foundation for professional qualification.

The training and development of these men and women will not end with a professional qualification. When they move into specialist, supervisory or management positions, training needs will still arise, which the Board's recommendations for training managers and supervisors, published separately, are meant to cover.

Appendices

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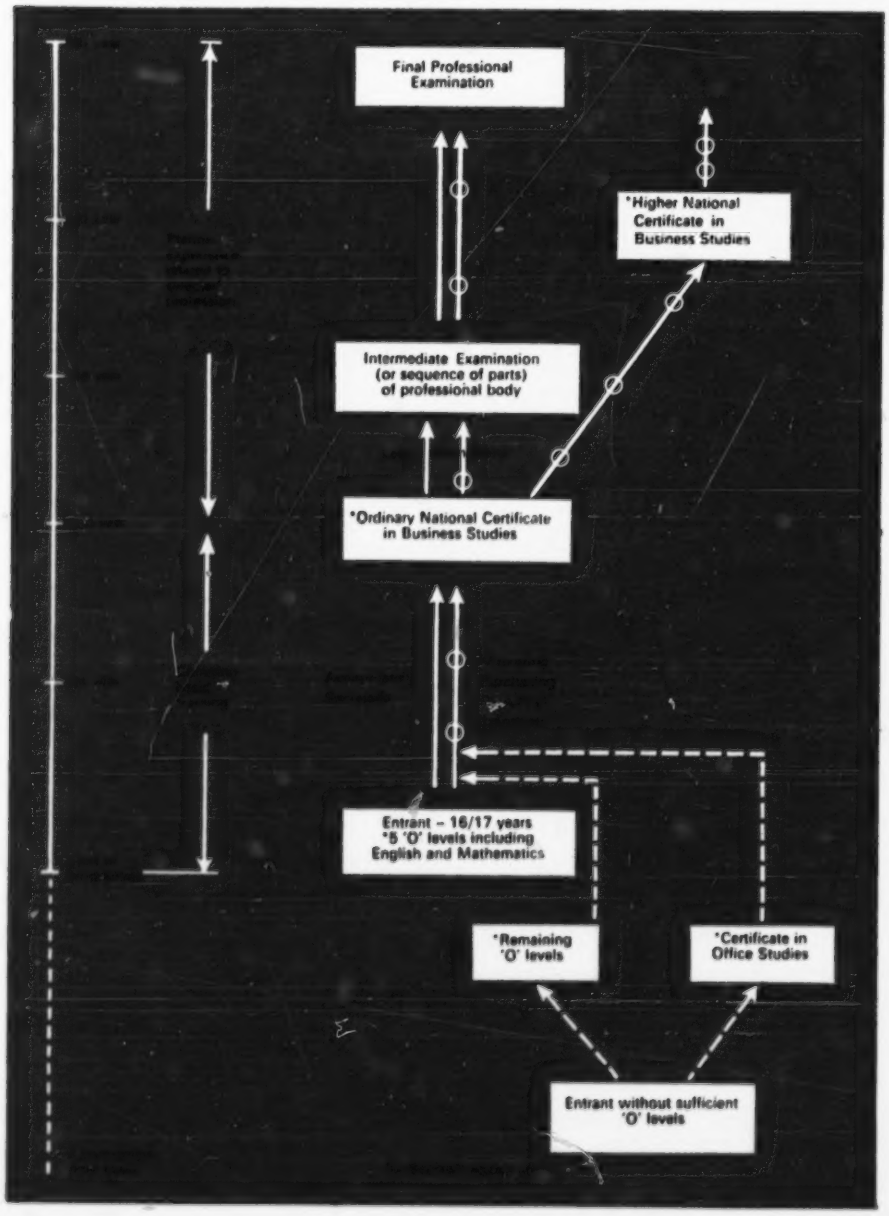
Appendix A

Recommended Pattern of Training and Further Education for Professional Commercial and Administrative Trainees


Final Professional Examination
*Higher National Certificate in Business Studies
Intermediate Examination (or sequence of parts) of professional body
*Ordinary National Certificate in Business Studies
Entrant – 16/17 years
*5 'O' levels including English and Mathematics
*Remaining 'O' levels
*Certificate in Office Studies
Entrant without sufficient 'O' levels

Appendix B

Overall Training Programme

TRAINEE: John Smith
BORN: 23.5.52 (Aged 16)
STARTS: 12.8.68
ENDS: 19.10.73

PURPOSE

The programme aims to provide the trainee with a broad understanding of the works, administrative and commercial organisation of the XYZ Carpet Co. Ltd. together with an appreciation of the purpose and activities of its component departments, and to provide the theoretical and practical training necessary to the practice of his future profession in the carpet industry and to the successful acquisition, where appropriate, of a professional qualification.

RESPONSIBILITIES

Arrange and supervise implementation of programme, agree start dates and arrange planned movements; arrange induction and college course enrolment: arrange and agree detailed programmes: arrange for assessment to be made and keep records: arrange for final choice of profession to be made at appropriate time, arrange programme for specialised training and job experience, and agree nomination of personal adviser.	Training Officer
Assist with planning and agree detailed programmes together with detailed supervision of trainee's programme within departments. Assess and record trainee's performance within departments.	Persons named in programme
Instruction.	Persons named in detailed programmes

PROGRAMME

CONTENT	DURATION	START DATE	RESPONSIBLE
A. Induction and General Factory Tour	2 weeks	26.8.68	Training Officer
B. Basic Training Course for Young Office Worker – Brimford Tech. College.	8 weeks	9.9.68	Training Officer
C. Basic Training:			
i. General office service	6 weeks	4.11.68	Miss Able
ii. Wages	8 weeks		Mr. Baker
iii. Purchasing	4 weeks		Mr. Charles
iv. Preparatory departments	4 weeks		Mr. Dunn
v. Weaving department	8 weeks		Mr. Enfield
vi. Tuning and maintenance	3 weeks		Mr. Franks
vii. Production planning and control	4 weeks		Mr. Green
viii. Work Study	5 weeks		Mr. Hill
ix. Finishing	3 weeks		Mr. Ivor
x. Quality control	3 weeks		Mr. Jones
xi. Warehouse	3 weeks		Mr. Kent
xii. Pattern stores	2 weeks		Mr. Long
xiii. Sales and Marketing			
a. home	7 weeks		Mr. Mason
b. export	3 weeks		Mr. Norman
xiv. Stock control	3 weeks		Mr. Owen
xv. Cost accounts	10 weeks		Mr. Plant
xvi. Financial accounts	10 weeks		Mr. Rogers
xvii. Personnel	4 weeks		Mrs. Smith
D. Specialised Training: to be arranged and agreed after choice			Training Officer
E. Further Education: enrolment on first year O.N.C. Business Studies at Redhurst College of Further Education.			Training Officer

Appendix C

Detailed Training Programme – Basic Training

DEPARTMENT:	General office services	TRAINEE:	John Smith
SUPERVISOR:	Miss Able	STARTS:	4.11.68
		ENDS:	13.12.68

PURPOSE

This programme is designed to give the trainee a knowledge of the layout of the premises, and the location of departments of the company's internal and external mail arrangements. It also aims to give an appreciation of the importance of efficient records and experience of the basic systems of filing and an introduction to stationery store-keeping. This is to reinforce and apply knowledge gained on the Basic Training course for Young Office Workers.

RESPONSIBILITIES

Arrange and supervise programme. Assess performance and aptitude of trainee and complete records. Discipline of trainee while within the department.	Miss Able
Giving instructions. Assessing performance and reporting to Miss Able.	Persons named in the programme

PROGRAMME

SECTION	CONTENT	INSTRUCTOR
A. Postal (2 weeks from 4.11.68)	i. – collection of incoming mail. ii. – opening, recording and sorting of mail. – letters, confidential and personal mail, – parcels, – cheques, credit notes, invoices, – advice notes, acknowledgements. iii. – distribution of mail. – location of depts., routes, times. iv. – collection of mail. – routes, times v. – sorting of mail. – internal, – external. vi. – preparation of outgoing mail for despatch. – enveloping and parcelling – stamping and franking. – recording. – sorting – parcels, registration, express delivery, recorded delivery, overseas, etc.	Mr. Thomas Mrs. Unsworth Mr. Thomas Mr. Thomas Mr. Thomas Mrs. Unsworth
B. Records (3 weeks from 18.11.68)	Checking material purchase and issue documents. Classify, code and allocate materials, storekeeping and stock control. Cost calculations, etc.	Mr. Arthur Mr. Brown Mr. Carter
C. Stationery (1 week from 9.12.68)	(complete on lines of above examples)	

Appendix D

Programme – Specialised Training

SPECIALISATION: Cost accountancy
ADVISOR: Mr. Vickers
TRAINEE: John Smith
STARTS: 24.8.70
ENDS: 19.10.73

PURPOSE

This programme aims to equip the trainee with a thorough knowledge of the theory of cost accountancy and practical experience of its applications to the standards required for membership of the Institute of Cost and Works Accountants. It also aims to develop the personal and management skills necessary for the effective performance of his likely future duties within the company.

RESPONSIBILITIES

The trainee is ultimately responsible to the Chief Accountant for his good conduct and satisfactory work.	
Arrange programme and movements, enrol on college courses, liaison with college, overall supervision of programme, progressing reports and maintaining records.	Training Officer
Personal and professional counselling.	Mr. Vickers
Assist with planning and agree detailed programmes, allocation of instructors and duties, together with supervision of trainee's programme within departments, assessing and recording trainee's performance within departments, discipline of trainee while within department.	Persons named in the programme
Giving instruction.	Persons named in detailed programmes

PROGRAMME

CONTENT	DEPT.	DURATION	START DATE	RESPONSIBLE
Time keeping and wages.	Wages	4 months	24.8.70	Mr. Baker
Labour cost allocations and control.	Cost office	3 months	28.12.70	Mr. Plant
Material pricing, cost allocations and stock control.	Cost office	3 months	5.4.71	Mr. Plant
Overhead.	Cost office	2 months	2.7.71	Mr. Plant
Purchase ledger	Financial accounts	2 months	etc.	Mr. Rogers
Sales ledger	Financial accounts	2 months		Mr. Rogers
General ledger	Financial accounts	1 month		Mr. Rogers
Costing procedures and techniques.	Cost office	6 months		Mr. Plant
Budgetary control and standard costing.	Cost office	6 months		Mr. Plant
Financial accounting.	Financial accounts	5 months		Mr. Rogers
Financial control.	Financial accounts	4 months		Mr. Rogers

SECONDMENTS

Short appreciation course on Organisation and Methods preceding period in O. & M. Department in 1971.	Training Officer to arrange
Period in Data Processing Department in 1971.	
Period in Company Secretary's Department concurrent with studies for Part V of A.C.W.A.	

FURTHER EDUCATION

Enrol for course leading to Part (ii) of A.C.W.A. – Brimford Technical College.	Training Officer

Appendix E

Detailed Training Programme – Specialised Training

DEPARTMENT:	Cost office	TRAINEE:	John Smith
SUPERVISOR:	Mr. Plant	STARTS:	28.12.70
		ENDS:	3.9.71

PURPOSE

This programme is designed to give training in the principles of labour allocation and control, material pricing, cost allocation and control and the compilation, allocation and apportionment of overhead, and to give experience of their application within the company. It aims to teach the procedures of the company in depth.

RESPONSIBILITIES

Arrange and supervise programme. Assess performance and aptitude of trainee and complete records. Discipline of trainee while within the department.	Mr. Plant
Giving instruction. Assessing performance and reporting to Mr. Plant.	Persons named in the programme
Professional guidance	Mr. Vickers

Formal instruction to be given by named person, trainee to carry out work after instruction.

Trainee to receive broader instruction from Mr. Plant – 2 hours per week.

PROGRAMME

SECTION	CONTENT	INSTRUCTOR
A. Labour cost allocation and control (3 months from 28.12.70)	Labour costing – analysis, allocation and summarising for posting to direct and indirect accounts; apportionment to cost centres and cost units. Labour cost control – efficiency of direct labour, output per man-hour, ratio of direct to indirect labour, analysis of bonus earnings, overtime and lost time, etc.	Mr. Williams
B. Material pricing, cost allocation and stock control (3 months from 5.4.71)	Checking material purchase and issue documents. Classifying coding and allocating materials. Storekeeping and stock control. Cost calculation and allocation to cost centres and cost units. Calculation of costs per unit of output.	Mr. Arthur Mr. Brown Mr. Carter
C. Calculation, allocation and apportionment of overhead.	(details worked out on lines of above sections)	

Appendix F

Training Record

DEPARTMENT: Wages
SUPERVISOR: Mr. Baker

TRAINEE: John Smith
FROM: 16.12.68
TO: 7.2.69

PROGRAMME CONTENT	COM-PLETED	KNOW-LEDGE	PERFORM-ANCE	INSTR-UCTOR
Preparing clock cards and attendance records	V	1 2 3 **4** 5	1 2 3 **4** 5	JB
Calculation of hours worked, overtime, etc.	V	1 2 **3** 4 5	1 2 **3** 4 5	JB
Calculation of bonus earnings	V	1 2 **3** 4 5	1 2 **3** 4 5	JB
Copy on to wages sheets	V	1 2 3 **4** 5	1 2 **3** 4 5	JB
Calculation of gross pay	V	1 2 **3** 4 5	1 2 **3** 4 5	JB
Calculation of net pay	V	1 2 **3** 4 5	1 2 **3** 4 5	JB
Casting, cross-casting and agreeing Wages sheets	V	1 2 3 **4** 5	1 2 **3** 4 5	JB
Making up Wage packets	V	1 2 3 **4** 5	1 2 3 **4** 5	JB
Assist at pay stations	V	1 2 3 4 **5**	1 2 3 4 **5**	JB

PROJECT WORK	COMPLETED		ASSESSMENT
None given			1 2 3 4 5
General conduct	1 2 3 **4** 5	Grasp of theory	1 2 3 **4** 5
Interest in work	1 2 3 **4** 5	Performance on job	1 2 **3** 4 5

ANY OTHER COMMENTS:

I have found John to be a willing and conscientious boy who fits in well. He is young and inexperienced but grasps what he is told quickly although the practical work falls short of his knowledge.

signed J. Baker
date 10th February 1969

N.B. Rating scale:

1. Unsatisfactory 2. Fair 3. Average 4. Above average 5. Outstanding
Rating to be indicated by a circle round the appropriate figure.

The board has published and circulated the following training recommendations and guides:

Training recommendations
- Managers and Supervisors
- Clerical and Commercial Occupations
- Operatives

Basic Handbook for Instructors

Guide to recruitment and Selection for Manual Jobs

Guide to Induction Training

Half-day Course on Safety for Juveniles

Guide to Grant Scheme for current training year

Employers are advised to consult the Regional Training Staff for information and advice at the following addresses:

Mr. W. E. Sutcliffe, Evelyn House,
32 Alderley Road,
Wilmslow,
Cheshire. SK9 1NX.
Telephone no. Wilmslow 27118.

Mr. A. MacKinnon,
Bridge House, Riverside North,
Bewdley,
Worcestershire.
Telephone no. Bewdley 3437.

Mr. W. P. King,
65 Bath Street,
Glasgow.
Telephone no. DOUglas 9597.

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